
Regularly Scheduled Series (RSS) Policies & Procedures

Continuing Medical Education



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Consider using this as your event checklist. Add reminders to your calendar or tasks.

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This booklet and associated forms can be found here:

<http://www.medicine.uiowa.edu/cme/>

Questions? Please contact:

Le Hotchkiss at 319-384-2931 or leann-hotchkiss@uiowa.edu

Prior to Approval

AMA PRA Category 1 Credit(s)TM

The Carver College of Medicine has been approved by Accreditation Council for Continuing Medical Education (ACCME) to offer *AMA PRA Category 1 Credit(s)TM*

For information on ACCME please visit their site at <http://www.accme.org/>

RSS Application

- ☐ Current programs are approved through June 30, 2023
- ☐ Reapplications are due every two years
- ☐ One year is considered 7/1 – 6/30
- ☐ New programs
 - Please email Le if you'd like to start a new RSS program
 - Course Director or planning committee member to complete RSS application online
- ☐ The disclosures of planning committee members and Course Director/s will be reviewed and reconciled during the application process.

Before Each Session

Commercial Support & Exhibits

Planning and delivery of CME content must be completely free of commercial interests and commercial bias.

- ☐ Commercial Support is a financial, or in-kind, contribution given by a commercial interest, which is used to pay all or part of the costs of a CME activity, such as an unrestricted educational grant. Advertising and exhibit fees are excluded from this definition.
 - If you are going to receive commercial support, please contact Teri Thomann in the CME office at 319/353-3023 or teresa-thomann@uiowa.edu two weeks prior to the event.
 - A [Written Agreement for Commercial Support](#) must be filled out and signed prior to the course by the company representative and either the course director or Teri Thomann.
 - All payments from commercial companies must be made payable to the sponsor (for example, the Carver College of Medicine, the CME Division, or your Department/Division).
 - All such grants must be disclosed to attendees prior to delivery of the program.
 - For questions or assistance with commercial support, please contact Teri Thomann in the CME office at 319/353-3023 or teresa-thomann@uiowa.edu.
- ☐ Advertising and Exhibits
 - For questions or assistance with exhibits, please contact Teri Thomann in the CME office at 319/353-3023 or teresa-thomann@uiowa.edu.
 - Please keep track of the income you receive to report this at the end of the year.

RSS Dashboard

- ☐ Setting up your sessions in the CME portal
 - <https://uiowa.cloud-cme.com>
 - Click the “Sign In” box in the upper left
 - Log in with HawkID and password
 - In the black footer, click “Administration”
 - Along left side in blue, click “Activities” then “RSS Dashboard”
 - *Adjust the date range, if needed*
 - *Change the status to “All,” if needed*
 - Edit the session by clicking on the title
 - Add the specific title of presentation to the name field, after the program name
 - Verify that the location is correct
 - Need a new location added? Email Le
 - Edit the date and time, if needed
 - Check the specialties for that session
 - Scroll to the bottom and click “Save”
 - If the session has been cancelled, click the red trash can below the title

- If you need to add a new session, either change the date of an unused session (remember to change the title too, if applicable) or email Le.
- ☐ To get the code for texting, find the number next to “Child ID” in the far-left column.

Disclosures Reviewed

Every speaker (including non-physicians) is required to disclose relevant financial relationships to the CME office as well as the audience attending. A review of these disclosures needs to happen **before** the speaker presents at each session. Per ACCME standards, anyone who does not disclose may not participate in the planning or presentation of a CME activity.

Please Note:

- ☐ Journal Clubs – the facilitator needs to disclose
- ☐ Tumor Boards & Case Conferences – the person/s bringing a case forward needs to disclose

All speaker disclosures must be reconciled & submitted by 8:00 am one business day prior to the event.
Instructions follow.

If your speaker is from UI Health Care . . .

- ☐ With few exceptions, UI employees are required to disclose annually in the Joint Office for Compliance eCOI database, so you most likely will not have to ask your speaker to disclose. The exception to this is if your speaker works across the river or is not affiliated with UI Health Care, in which case their disclosures do not feed into our disclosure database. If this is the case, please see the following section for “UI” speakers on page 7.
- ☐ To review the disclosure please do the following
 - <https://uiowa.cloud-cme.com>
 - Click the “Sign In” box in the upper left
 - Log in with HawkID and password
 - In the black footer, click “Administration”
 - Along left side in blue, click “Activities” then “RSS Dashboard”
 - *Adjust the date range, if needed*
 - *Change the status to “All,” if needed*
 - *To see a demo of this portion, please visit*
<https://medicine.uicapture.uiowa.edu/Panopto/Pages/Viewer.aspx?id=42aa9e8c-7b7b-40e0-9897-a99300fdf2d5> and log in with your HawkID & password
 - In the faculty column, please uncheck “Request Disclosure.”
 - Enter the last name of your speaker, pause, and then click on their name. Review the email as well, as a way to double-check that you’re selecting the correct person.
 - Once their name is in the box, click the green plus sign, to add them.
 - This will take a few moments to process, it will look like nothing is happening. Just hang tight and their name should get added to the column, outside of the box. It should look like this once complete

[Luis Ochoa
Nunez, MD](#)



- Next, look at the column to the right. It will tell you about their disclosures.
 - If it lists their name and “Nothing to Disclose” and the status has changed to

Graeme Pitcher, MD:
Nothing to disclose -
Disclosure Submitted:
4/30/2018

“pending” you’re all set! There is nothing left to do.

Jessica Boyle - NO
DISCLOSURE

- If it lists the name and “No Disclosure” like this then it means they need to disclose at eCOI.
 - Please direct them to <http://ecoi.uiowa.edu>
 - Once they’ve disclosed it should update in the RSS Dashboard overnight
- If it lists sponsored research or a disclosure with a commercial interest, bring up their disclosure form in the “old” disclosure database at this site:
<https://webapps1.healthcare.uiowa.edu/cmedisclosure/startpage.aspx>
 - Click on the second link for CME Coordinators.
 - Sign in with your HawkID and password.
 - Click the Disclosure Review Report button.
 - Click the Select UI Employee button.
 - Type the presenter’s last name into the Search Last Name field.
 - Locate the presenter’s name in the list and click Select.
 - Enter the series name (e.g. Internal Medicine Grand Rounds) and the presentation date.
 - Have the Course Director complete the review using any but the first checkbox. (See [Conflict of Interest Review Guidelines](#) for guidance in reviewing for conflict of interest.)
 - Convert the page to a PDF and e-mail to rss-cme@healthcare.uiowa.edu by 8:00 am one business day prior to the event
- If it lists that the presenter is a founder or employee of a commercial interest, please email their slides to leann-hotchkiss@uiowa.edu ideally one week in advance of the session.
 - There are additional requirements we must follow to be compliant with ACCME in this situation. In order to still offer CME the presentation must fall into one of the below categories:
 - The CME activity is not related to the business lines or products of their employer.

- The content is limited to basic science research or the processes/methodologies of research, themselves unrelated to a specific disease or compound/drug. No content that is related to clinical applications or clinical recommendations related to or concerning the business lines or products of their employer.
 - Employees of ACCME-defined commercial interests can participate as technicians/trainers to teach the safe and proper use of medical devices. There is a special form that would need to be completed in this scenario.
- ☐ If your program is a tumor board or case conference, where there may be multiple people presenting cases, and you may not know who it will be...
- Email Le for a faculty import spreadsheet. Please complete this, being mindful of spellings and degrees.
 - Email to rss-cme@healthcare.uiowa.edu and Le will upload this spreadsheet to the system
 - All names from the spreadsheet will then be automatically populated in the faculty columns of RSS Dashboard for all of your future sessions
 - Please review the disclosures to ensure that they are current and completed
 - If there is a disclosure listed, you don't need to do anything else here. What's most important (because this is a group discussion-based program), is that you make sure to disclose their disclosures to the audience. See announcement information on pages 8 & 9.
- ☐ If you do not see their name in the drop-down box, it probably means they have never attended a CME event and aren't in the system.
- Check their disclosure in the "old" disclosure database at this site: <https://webapps1.healthcare.uiowa.edu/cmedisclosure/startpage.aspx>
 - Click on the second link for CME Coordinators.
 - Sign in with your HawkID and password.
 - Click the Disclosure Review Report button.
 - Click the Select UI Employee button.
 - Type the presenter's last name into the Search Last Name field.
 - Locate the presenter's name in the list and click Select.
 - Do you see a name and disclosure date?
 - If yes, email the presenter and ask them to go to the CME portal to log in with their HawkID & password. The disclosure will get matched to their profile overnight.
 - If you don't see them listed it means either they are not within UI Health Care or they haven't yet disclosed.
 - Ask Le to see if they can find them in the eCOI site, where people that are not in UIHC would appear, and we can confirm the last date they disclosed, if ever.

If your speaker is from UI (but not UI Health Care) . . .

- ☐ Ask Le to see if she can find them in the eCOI site, where people that are not in UIHC would appear, and we can confirm the last date they disclosed, if ever.

If your speaker is NOT from The University of Iowa . . .

- ☐ You will check to see if the presenter is already in the system. To do that:
 - Go to their session in the RSS Dashboard. Start typing their last name in the faculty column. Scroll through until you find where their first name should be. If you find them, check the email address that's listed – is it the email you have for them? If yes – great! You've found them. Click on their name.
 - If you don't see them listed, you'll have to add them to the system. Follow the next bullet.
- ☐ To add an external presenter to the system:
 - Along the left side in blue, go to Membership – Add Member.
 - Here you will complete the basic info – everything with a *
 - For their password, please use their email address
 - Once you save this profile, you won't be able to go back into it. So please be sure everything is the way you want it. Scroll to the bottom and click Save.
- ☐ Email the presenter and ask them to complete their disclosure online. Please give them this link to use: <https://uiowa.cloud-cme.com/Form.aspx?FormID=10>
- ☐ Go back to your session in the RSS Dashboard, and now add their name as the faculty member.
- ☐ Once they've completed their disclosure, it will automatically show up in the RSS Dashboard.
- ☐ If they have disclosures, they can upload their slides to the site or email them to you. You'll need to get your Course Director or planning committee member (who doesn't have disclosures themselves) a [Conflict of Interest Review form](#) to complete. Just scan and email that to rss-cme@healthcare.uiowa.edu by 8:00 am one business day prior to the session.
- ☐ If they do not have disclosures, Le will be approving the session and there is nothing else you need to do.

Program Announcements

All programs must have fliers and/or emails. You may format to your own specifications; however, the following items must be included. A sample flier is on the following page.

- Series Title
- Session Title, Date & Time (start time – end time), and Location
- Sponsored by the Department of _____ and the University of Iowa Carver College of Medicine

The CME Accreditation statement and the CME Credit Designation must appear word-for-word as listed below (with your credit hours inserted in the designation statement - 1 hour meeting=1.0 credit), and they must be separated into two paragraphs.

- CME Accreditation: The University of Iowa Roy J. and Lucille A. Carver College of Medicine is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians.
- CME Credit Designation: The University of Iowa Carver College of Medicine designates this live activity for a maximum of ____ *AMA PRA Category 1 Credit(s)*TM. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

Disclosure Policy: One of the two below

1. Everyone in a position to control the content of this educational activity will disclose to the accredited provider all financial relationships with ineligible companies whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.
2. To provide proof that disclosures of planning committee, course director/s and speakers were made known to the audience, many programs are including this information in the announcement.

<i>Planners/Presenters</i>	<i>Disclosures</i>
Zuhair Ballas	<i>Checkmate Pharmaceuticals - Consultant</i>
Diana Bayer	<i>No relevant relationships to disclose</i>
Benjamin Davis	<i>Aimmune Therapeutics - Sponsored Research</i>
Svjetlana Dolovcak	<i>No relevant relationships to disclose</i>

Mitigation Statement: One of the two below

1. If none of your planners or presenters have relevant relationships, please add the following to your flier: “None of the planners or presenters of this educational activity have relevant financial relationships(s) to disclose with ineligible companies whose primary business is producing, marketing, selling or distributing healthcare products used by or on patients.”
 2. If your planners or presenters have relevant relationships, please add “All relevant relationships have been mitigated.”
- Target Audience
 - Educational Objectives
 - Case conferences & tumor boards, or single-focused lectures: refer to your RSS Application
 - Grand Rounds: specific to each session
 - A contact person

Email announcements to RSS-CME@healthcare.uiowa.edu by 8:00 am one business day prior to the event. Please include this email in your distribution lists.

Program Announcement Example (for Case Conferences & Tumor Boards)**XYZ Conference****Sponsored by the Department of Happiness and the University of Iowa Carver College of Medicine.****Dates:** (used for case conferences and tumor boards)

01/05/16	03/22/16	05/03/16
01/12/16	03/30/16	05/10/16
01/26/16	04/05/16	05/18/16
02/02/16	04/12/16	06/14/16
02/09/16	04/19/16	06/21/16
03/08/16	04/26/16	

Objectives: At the conclusion of this activity, the participant will be able to:

- Discuss options in evaluation and management of patients with a variety of diseases and surgical complications.
- Analyze clinical situations and formulate treatment plans and apply the applicability of clinical trials and best practices.
- Select patients who may be eligible for current clinical trials.
- Understand multidisciplinary management of diseases.

Time: 4:00 – 5:00 p.m.**Location:** Ziffrin Auditorium**Target Audience:** Faculty, PAs, nurses, fellows, residents, and medical students.**CME Accreditation:** University of Iowa Roy J. and Lucille A. Carver College of Medicine is accredited by the Accreditation Council for Continuing Medical Education (ACCME®) to provide continuing medical education for physicians.**CME Credit Designation:** University of Iowa Roy J. and Lucille A. Carver College of Medicine designates this live activity for a maximum of 1.00 AMA PRA Category 1 Credit(s)™. Physicians should claim only the credit commensurate with the extent of their participation in the activity.**Planners/Presenters****Disclosures**

Zuhair Ballas	Checkmate Pharmaceuticals - Consultant
Diana Bayer	No relevant relationships to disclose
Benjamin Davis	Aimmune Therapeutics - Sponsored Research
Svetlana Dolovcak	No relevant relationships to disclose

Mitigation Statement: All relevant relationships have been mitigated.**Contact:** If questions, please contact Jane Smith at (33)5-5555.

During Each Session

Disclosures Known

- ☐ All speaker/s, planning committee members and course director/s disclosures must be made known to attendees before the presentation begins. This can be accomplished in a variety of ways, including:
 - An email of the session announcement which includes a list of the disclosure/s (see page 9 for an example)
 - A verbal disclosure by the presenter or moderator. The following link includes language that can use to disclose financial relationships [Script for Disclosure](#) (be sure to include planning committee and course director/s)
 - Using the second slide in a presentation (be sure to include planning committee and course director/s)

Attendance

- ☐ The ACCME requires that we report the number of everyone in attendance, even if they are residents, nurses, students, or professional staff.
 - Speakers are not eligible for credit from sessions at which they present, and they should be excluded from texting.
 - You can double-check if they texted by going to the Record Attendance screen and then removing credit. Please see “Manually Recording Attendance” on page 12.
 - If they only presented for ½ of the session, they can claim credit for the other ½ in which they were a participant. Please see “Manually Recording Attendance” on page 12.
 - Attendees are responsible for texting their attendance or claiming credit at each session when they arrive.
 - CME credit will not be awarded to those who do not text or claim credit.
 - Please do not email or publicize the 5-digit activity code prior to the activity. We require that individuals be present for the education before they receive the code.
- ☐ Three ways to record attendance.
 1. Texting (we recommend)
 2. Mobile app
 3. Website
- 1. Texting
 - To text attendance individuals must:
 - Have a profile in the system (which means they’ve attended an RSS in the past).
 - If not, go to <https://uiowa.cloud-cme.com> and log in with HawkID and password.
 - Text your @uiowa.edu email address to (844) 980-0525. You only need to do this one time.
 - You should receive a message that your phone number was updated.
 - Text this session’s 5-digit activity code to record your attendance. Do this 15 minutes prior, during, or 60 minutes after the session ends. SMS text only (not an iMessage).

- You should receive a confirmation that your attendance was recorded.
- Save the CME Attendance (844) 980-0525 as a contact in your phone.

2. Mobile app

- Go to your mobile app store
- Download “Cloud CME”
- When prompted, enter our organization code of “uiowa”
- Sign in with your HawkID & password
- Click “Claim Credit” to enter the 5-digit activity code and record your attendance. Do this 15 minutes prior, during, or 60 minutes after the session ends.

3. Website

- Visit <https://uiowa.cloud-cme.com>
- Log in with your HawkID & password (Sign-In button in upper left)
- Select “My CME”
- Select “Claim Credit”
- Enter 5-digit activity code. Do this 15 minutes prior, during, or 60 minutes after the session ends.

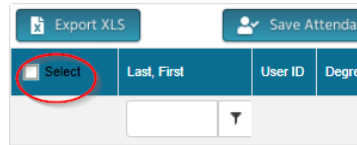
After the Session

Proof Disclosures Made Known

- ☐ Within one week after the event, please email rss-cme@healthcare.uiowa.edu proof that disclosures of speakers and planning committee and course director were announced to the audience. Acceptable documentation includes the following:
 - If disclosures were included in the announcement email, we should already have a copy and you don't need to do anything
 - A copy of the title and disclosure slide (*planning committee and course director must be included or proof in another way for them*)
 - Written attestation from the program coordinator that the disclosure report/s were displayed at the check-in area
 - Written attestation from a person in attendance that verbal disclosures were made, to include the names of all planning committee members, course director/s and presenters with disclosure status.

Manually Recording Attendance

- ☐ If an attendee didn't record their attendance in one of the three ways listed above, you can still manually record their attendance at any time.
 - <https://uiowa.cloud-cme.com>
 - Click the "Sign In" box in the upper left
 - Log in with HawkID and password
 - In the black footer, click "Administration"
 - Along left side in blue, click "Activities" then "Record Attendance"
 - Bring up the session in one of two ways:
 - Type the name of the session (however you named it in the RSS Dashboard). Do not hit enter. There will be many listed – **do not select the first one you see!** You'll need to scroll towards the bottom and hover your mouse over a session to see the date, which appears in a white rectangular pop-up window. Select the specific session. –
 - Enter the Child ID number, found in the RSS Dashboard for that session.
 - You will see a list of people who have attended at some point in the fiscal year. Only those individuals in blue, with a number >0 under the "Hours Claimed" column attended this session.
 - If the person you're adding was a participant for less than the whole time, adjust the number of credits the session is going to award.
 - Award credit to the individual. Do one of the following:
 - Look up their name in the list along the right-hand side. Are they listed?
 - If yes:
 - Click the box next to select in the upper left-hand side of the name grid, so that you select all the names.



- Then, click the box again, to deselect all the names.
 - Finally, click only the box for the individual you want to award credit.
 - Towards the top of the grid, click “Save Attendance.”
- If no:
 - Under “Lookup & Add Existing User” type in the last name of the person you’re looking for. The system will give you a list of matching names that are in the system.
 - Select the appropriate person, reviewing their email along the right.
 - You’ll receive a pop-up message asking if you want to add the individual. Select “Ok.”
 - You will receive another message to confirm credits have been awarded. Click “Ok.”
- You can confirm the individual has been added by reviewing the panel along the right.

Throughout the Year

Evaluations

To achieve compliance with the ACCME's criteria, programs must complete two evaluations in the CME portal every year, preferably in October and March (if you want to use the system for more than two evaluations, just let Le know).

- ☐ Notify Le of which dates you want your evaluations assigned to. Please notify us one week in advance.
- ☐ Notify your learners that an evaluation will be available to them after the session is complete. Please Note: To receive an evaluation, learners must text (as opposed to claiming credit on the mobile app or website). If learners typically claim credit, please ask them to let you know ahead of time, so that you can manually record their attendance instead (see instructions on page 12).
- ☐ To complete an evaluation via website:
 - Using Chrome, FireFox (or any browser other than Internet Explorer) please visit <https://uiowa.cloud-cme.com>
 - Sign in with your HawkID and password
 - Select "My CE"
 - Select "Evaluations and Certificates"
 - Select "Download Certificate" for the name of the program you are evaluating. A pop-up window will appear asking if you'd like to complete the optional evaluation.
- ☐ Emails will be sent out from the system a couple of days after the session, reminding those learners who attended but didn't complete the evaluation.
- ☐ You will have access to run evaluation reports to review the submitted feedback. The evaluations report provides a visual display of user responses to specific activity evaluations.
 - Enter in the title in the search box (as it appears in the RSS Dashboard)
 - You can define the graphic display by showing or hiding the display types (charts, tables, objectives, faculty, comments and/or show all).
 - The data will display on the Chart Results tab.
 - The evaluation questions will display in the Questions column. You can deselect evaluation questions that you do not wish to see the data.
 - The Not Completed tab allows you to view those learners that have not yet completed the evaluation form.
 - Please share these with the Course Director.

Financial Summary

- ☐ Please keep track of commercial support or federal/state grants, exhibit/advertising income, and expenses (such as refreshments, honoraria and travel) associated with your RSS program.
- ☐ E-mail your totals to RSS-CME@healthcare.uiowa.edu by 08/15.

Honoraria and Travel Reimbursement

- ☐ An acceptable honorarium for category 1 (CME-approved) events Sponsored by the Carver College of Medicine will include amounts up to \$2000 per presentation. If this amount restricts participation by an individual speaker, the course director can request a formal appeal from the CME Division. The appeal will be reviewed in a timely fashion (within one week) by the CME committee, and the course director will be notified immediately of the Committee’s decision.
- ☐ Out-of-pocket, per diem, airfare, ground transportation, and other travel expenses for planners, teachers, speakers, instructors, and authors will be paid in compliance with University of Iowa policies governing travel reimbursement.

Personnel Changes

Changes in either the Course Director or the Coordinator should be communicated immediately to the CME Office. Additionally, please forward these requirements and procedures to replacement staff as appropriate.

- ☐ If the change is in the Course Director role, please run the new Directors’ disclosure form and email it to us at rss-cme@healthcare.uiowa.edu

Transcripts

- ☐ All faculty and staff can pull their own transcript following the below:
 - Go to <https://uiowa.cloud-cme.com> and log in with your HawkID and password
 - Click “My CME” in the upper right of your screen
 - Click “Transcript”
 - Type in your desired date range
 - Download the transcript
- ☐ You can also alias as someone to pull their transcript. Please follow the below steps:
 - Go to <https://uiowa.cloud-cme.com> and log in with your HawkID and password
 - In the black footer, next to the “Administration” link, there is a white rectangular box. Start by typing in the individuals last name
 - Select the person’s name
 - Click “My CE” in the upper right of your screen
 - Click “Transcript”
 - Type in your desired date range
 - Click “Apply”
 - Download the transcript
 - To switch back to being yourself – select your name from the rectangular box in footer.

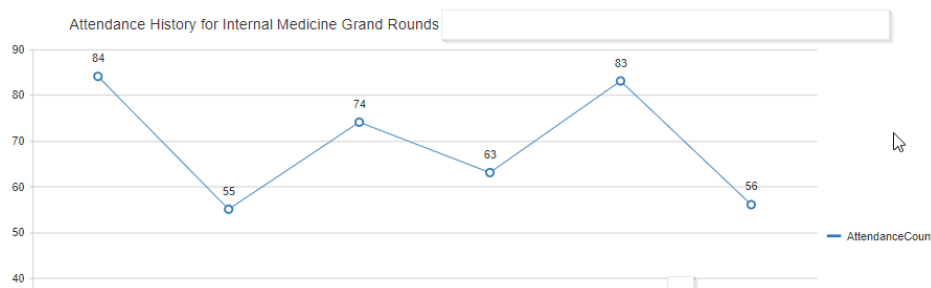
Credit Reports

Attendance reports can be ran after every session, or every six months, etc. Please follow the below steps to complete these reports.

- ☐ <https://uiowa.cloud-cme.com>
- ☐ Click the “Sign In” box in the upper left
- ☐ Log in with HawkID and password
- ☐ In the black footer, click “Administration”
- ☐ Click “Reports” then “Credits”
- ☐ Want a report for just one session?
 - In the activity field, type the name of your session and click it once found (may need to scroll down to get a particular date – let your mouse hover over the title and a little window will pop up with the date)
- ☐ Want a report for the last six months, for example? A series of sessions?
 - Adjust the date range
 - Click “Parents Only” (this is the umbrella program that all sessions sit in)
 - Type the name of the program
 - Click on the program name that you’re looking for (hover mouse over name to see date series began)
- ☐ Click “Run Report”
- ☐ Click “Export XLS”
- ☐ Manipulate the columns/rows, as needed

RSS Attendance History

- ☐ <https://uiowa.cloud-cme.com>
- ☐ Click the “Sign In” box in the upper left
- ☐ Log in with HawkID and password
- ☐ In the black footer, click “Administration”
- ☐ Click “Reports” then “RSS Attendance History”
- ☐ Be sure that “Parents Only” is checked.
- ☐ Start typing your program name in the white box. Adjust your date range. Click “Run Report”
- ☐ There will be three tabs to review: Attendance History, Attendance Data, and Unique Participants.



Faculty Development Sessions

If your program would like to flag your sessions as faculty development, please let me know. I would then assign this as a credit type, and all faculty development sessions that were attended would appear on a transcript together.

Once flagged by me, you (or your departmental education leader) would identify which category it falls under, and would then mark that in the title of your session. Below are the categories and the abbreviations as they should appear in your session title.

Categories:

- Education (Educ)
- Quality Improvement & Patient Safety (QI & PS)
- Wellness (Well)
- Patient Based Learning & Improvement (PBLI)
- Other

Division of Duties

Management of an RSS includes various tasks, some of which must be completed by the series Course Director and others of which can be completed or overseen by the Coordinator.

Course Director	Coordinator
Educational planning <ul style="list-style-type: none"> – along with Planning Committee members – to include completion of online RSS Application 	Maintain series documentation <ul style="list-style-type: none"> – Disclosure and Conflict of Interest Review – Program announcements – Letters of Agreement for commercial support – Financial Summary
Oversight of series evaluation process	
Selection and oversight of a coordinator to maintain essential documentation and communicate with the CME Office	Forward session announcements / emails
Resolution of conflicts of interest before the educational activity	Maintain accurate records of program sessions in the CME portal